

Your Guide to Being a Trustee



**A resource from North Tyneside
Voluntary Organisations Development Agency (VODA)**

- What is a trustee?
- What does a trustee do?

What is a trustee?

In charities and voluntary organisations throughout the country, whether it's a small group of volunteers working locally or a large, complex national charity with paid staff, there is a group of people who are responsible for the organisation. These people are the trustees.

Trustees work in a group - which may also be known as the management committee, executive committee, steering committee, board of directors or board of trustees.

It is often simply referred to as 'the board' - they all mean the same thing. This board is the body that is legally and financially responsible for the organisation as a whole. The responsibilities and duties of trustees are outlined on page 4 of this guide.

The great majority of trustees serve as volunteers and receive no payment for their work.

What does a trustee do?

Trustees carry out a range of roles and duties that ensure that the organisation runs well.

Trustees make the major decisions affecting the organisation. They are responsible for setting out the strategic direction of the charity and must be confident that it is well managed and meeting its objectives.

It is the trustees' responsibility to ensure the organisation is financially secure and complies with all relevant legislation.

There are a number of specific roles that trustees can undertake, which may require specialist knowledge or experience. These are often called executive roles and are summarised on page 3.

Some facts about trusteeship

There are over 1 million trustee positions in England Wales

The average age of trustees in England and Wales is 59

There are some 86,000 'young' trustees - aged between 16 and 34

There are approximately 194,000 charities in the UK

Almost half of all charities have at least one vacancy on their board

- Executive Roles
- What is expected of me?

Executive Roles

Within each board there are a number of special - or executive - roles. These are often taken by people with experience or a specific skill or area of knowledge.

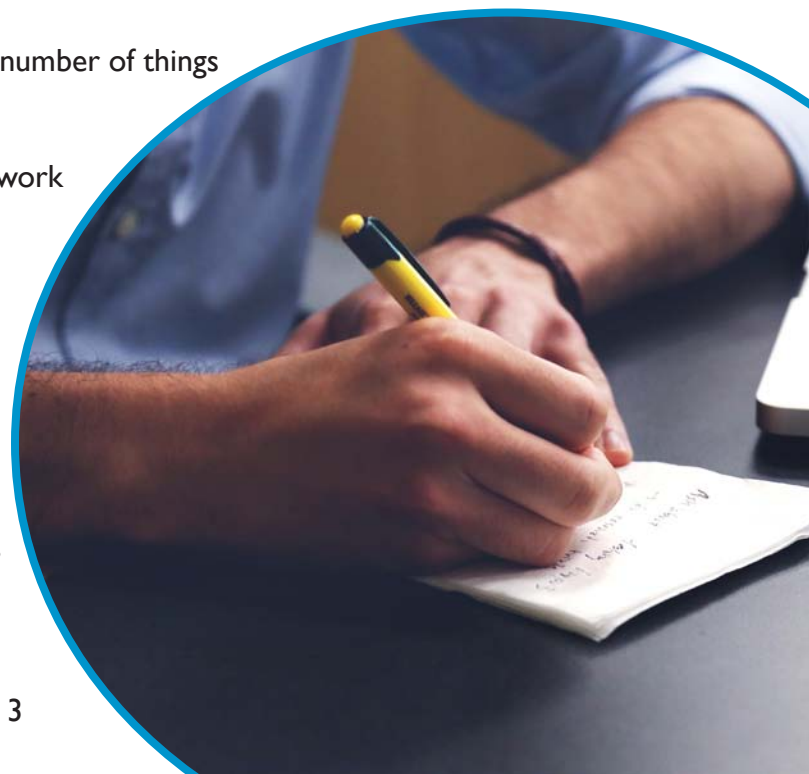
- Chair** Takes a leadership role, setting the agenda and chairing meetings as well as the link between any staff and trustees. The Chair will meet regularly with the head of the organisation and may attend events or official functions on behalf of the organisation.
- Vice Chair** Deputises for the Chair when they are not available, and may take on specific responsibilities delegated by the Chair.
- Treasurer** Works to ensure that proper accounts are kept up to date and to develop financial policies.
- Secretary** Supports the chair through making arrangements for meetings, taking minutes, following up to ensure actions have been carried out and circulating papers prior to a meeting.

VODA has Information Sheets providing more detailed descriptions of each of these roles, which you can download from www.voda.org.uk or request by contacting VODA on 0191 643 2626. We also provide tailored training to groups and organisations on the roles and responsibilities of trustees.

What is expected of me?

No matter what your role on the board, there are a number of things expected of you as a trustee. These include:

- Being committed to your organisation and its work
- Being able to devote the necessary time and effort to your role
- Honesty and integrity
- A commitment to equal opportunities and involving everyone in the work of the charity or organisation
- The ability to work as part of a team, to contribute and to listen to the views of others
- An understanding and acceptance of the legal duties, responsibilities and liabilities of being a trustee (see page 4)



- What are my responsibilities?
- Who can become a trustee?

What are my responsibilities?

This is a broad summary of some of the roles and responsibilities you have as a trustee:

- Furthering the charity's overall purpose, as set out in its governing document, and setting its direction – for example, by developing plans and strategies and monitoring progress.
- Ensuring the work of the charity is effective, responsible and legal – for example, by the use of policies and procedures and systems for monitoring and evaluating the charity's work.
- Safeguarding finances, resources and property and ensuring they are used to further the charity's purposes – for example, by insuring and documenting assets, maintaining financial systems, monitoring income and expenditure and ensuring the charity is financially sustainable or viable.
- Being 'accountable' to those with an interest or stake in, or who regulate the charity – for example, by preparing annual reports and accounts and consulting with stakeholders.
- Being clear about who carries out work on behalf of the charity – trustees, staff, volunteers – and respecting boundaries between the governance role of the board and operational or day to day matters.
- Ensuring the board operates effectively – for example, ensuring it receives the right reports and advice, by planning the recruitment and induction of trustees, providing trustees with support and training or carrying out reviews or appraisals of the board's effectiveness.

For a full and comprehensive guide to trustees' responsibilities, see the Charity Commission's guidance - The Essential Trustee - which can be downloaded from:
www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3

VODA also has useful Information Sheets around trustee responsibilities and can deliver tailor-made training to groups and organisations on the topic. Visit www.voda.org.uk or telephone 0191 643 2626.

Who can become a trustee?

The short answer is that almost anyone over the age of 16 (18 for certain responsibilities) can become a trustee, but there are a few restrictions.

Those not legally allowed to be trustees of a charity include those previously disqualified as a company director, or those who have been convicted of an offence involving dishonesty or deception.

Trustees come from all walks of life. You do not need to be a graduate or have a job. You do not need to be a financial expert or have management experience. Different organisations are in need of different skills and knowledge - for example it may be that your knowledge of your local area or a particular cause would be a much-needed contribution.

- Why should I become a trustee?
- How do I become a trustee?

Why should I become a trustee?

Here are some of the many benefits of becoming a trustee (see pages 6 and 7 for case studies too!)

“I can be a more active citizen and make a positive contribution to my community”

“I get to use my skills, experience and knowledge and develop my own career prospects”

“I feel like I’m giving something back - there’s definitely a feel-good factor for me”

“I’ve met lots of new and like-minded people who work together for a common aim”

It’s a great way to gain experience of management roles and develop skills valued by business”

How do I become a trustee?

Here are some ways you can become, or find out more about becoming a trustee in North Tyneside:

Get in touch with VODA!

Along with our Volunteer Centre, we can help you find a suitable vacancy and help you to prepare to become a trustee through training and advice. We have a range of resources to help you and we regularly advertise local trustee vacancies. Visit www.voda.org.uk for more information or contact us directly on 0191 643 2626 or email development@voda.org.uk for more information.

Respond to advertisements

Organisations will often publicise their trustee vacancies in the local press in the way they would advertise jobs. Be professional when you respond and expect an interview process.

Contact the organisation directly

If you are interested in becoming a trustee of a particular organisation, they should have a formal document which explains how they operate, and this will set out their process for recruiting trustees. Contacting them directly is the quickest way to find out if they have trustee vacancies - it also shows that you care about what they do.

Look online

National volunteering website www.do-it.org.uk enables you to search for opportunities. Other organisations that advertise trustee vacancies include NCVO, VONNE and Guardian Jobs.

Case Study: Ray Lowry, Company Secretary of Tynemouth Priory Theatre



Tynemouth Priory Theatre was formed in 1946 and is now a registered charity that puts on regular performances and a calendar of other social events. Company Secretary Ray Lowry describes his experiences of being a trustee at the ‘little jewel’ in the community:

“For many years I was interested in amateur theatre but I didn’t have much time. When the kids left home my wife said “oh you can go and do your hobby now” so I came and joined the theatre. Immediately I got swept up in the place because there’s lots to do and over the years I’ve done everything - built sets, acted in plays, written scripts and so on. Then I stepped up to

the committee - it’s a big organisation and it takes a lot of running and I felt it was important that I did some of that rather than just enjoy the bright lights and applause. So I joined the committee several years ago.

“It’s being able to put something back into the community”

One of my responsibilities as secretary is making sure that the place is run properly, that we comply with the law and do what’s necessary. It’s a difficult balance to strike between getting everything right and also making it enjoyable - and that’s the skill that a trustee has to have.

The benefit of being a volunteer is that you get a lot of satisfaction from being part of an enterprise and making something work. There’s more to it than personal satisfaction though - it’s being able to add something back to the community. This place exists because the people before us did that very thing - they sacrificed their time and put in a lot of hard work and my concern is to make sure that continues in the years to come and that we make the right decisions for the future. ”

Case Study: Leanne Wallwork, Chairperson of Out of Sight



Out of Sight is a parent-led charity supporting visually impaired children in North Tyneside, many of whom have profound disabilities. They provide events, activities, advice and other support to the children and their families. Chairperson Leanne Wallwork (picture third on the right) talks about being a trustee.

“I’ve been involved with Out of Sight for about eight years. My own daughter was diagnosed at six months old with having a visual impairment. We came out of hospital with a lot of information - there are a lot of technical terms that you don’t really take in so I did a little bit of research and found out there was a local community group; I got involved and it’s just went from strength to strength.

“I love it. We class it as being part of an extended family”

I’ve done a few different roles within the charity - I was secretary, then became Chairperson last year. I love it. It’s lovely being part of a community group and we class it as being part of an extended family.

What does my role involve? The meetings that we have, I chair so we have an agenda and I make sure that we stick to the points on it because we can get distracted. And it’s making sure any points that need to be raised are done so and that minutes are taken so we can look back on them. It’s an important part of being the Chairperson of Out of Sight and it’s also an enjoyable one because, although everything we do is all about the children, the technical side still needs to be done.

What would I say to anyone thinking about becoming a trustee? Being a trustee is not a life-long commitment - you can have a go and see if you enjoy it. It’s being able to make a change which is most important. I’d always encourage someone to give it a try.



Your Guide to Being a Trustee

- Useful resources
- Contact Information

Useful Resources

Here are just some of the useful resources available to trustees and anyone thinking about trusteeship:

North Tyneside VODA

As the local support and development agency for North Tyneside, we provide advice, support and training to new and existing trustees in the borough. We can advise on everything from the roles and responsibilities of being a trustee through to recruiting new trustees or offering help if times get tough.

www.voda.org.uk

The Essential Trustee: What you need to know

This is the Charity Commission's official guidance for trustees and includes detailed information on what trustees do, their legal responsibilities and the specific roles of chair and treasurer.

www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3

VONNE (Voluntary Organisations Network North East)

VONNE has a number of resources to help North East trustees, including a dedicated LinkedIn group where organisations can advertise vacancies.

www.vonne.org.uk

NCVO (National Council for Voluntary Organisations)

NCVO also has offers a range of resources and information for trustees, including events and training.

www.ncvo-vol.org.uk/governanceandleadership

The Big Board Talk - 15 Questions trustees need to ask

A Charity Commission resource that acts as a checklist for all trustees

www.gov.uk/government/publications/charity-trustee-meetings-15-questions-you-should-ask

Find more useful publications and resources on the Support for Trustee pages at www.voda.org.uk.

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